Alberta Tourism Market Monitor

Accommodation and food services employment numbers up in Q1 2017

Alberta's labour market showed encouraging signs of recovery with employment increases in the accommodation and food services industries in the first quarter of 2017.

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The job growth in accommodation and food services complements the overall increase in Alberta's full-time job numbers. According to Statistics Canada, employment in the province rose by 20,000 in March, all in full-time positions. Overall employment in Alberta has been on an upward trend since last fall.

Employment in the accommodation and food services industries experienced a 4.4% increase in January, a 6.5% increase in February and a 5.6% increase in March.

Total arrivals and departures at Edmonton International Airport (EIA) are also gaining altitude, with an increase of 4.7% in March 2017 compared to the same month last year. The positive numbers at EIA are driven by strong performance in domestic air traffic, which is up 7.7% over March 2016.

The total occupancy rate for Alberta (excluding resorts) edged up by 1 point to 48.9% in February ccompared to the same time last year. The average daily room rate in Alberta for February stood at $129, representing a 2.4% drop from February 2016. On the resort side, the occupancy rate for Alberta edged down by 1 point in February over the same period in 2016 but the average daily room rate went up by 6.5% compared to last February.

2017 Alberta Tourism Market Monitor
Alberta Culture and Tourism

	Jan.	Feb.	Mar.	Apr.	May	June	July	August	Sept.	Oct.	Nov.	Dec.	Yr-to-Date
Air Passengers 2017 (000's of arrivals and departures) [1]													
Edmonton International Total	569.1p	547.0p	**605.4p**										**1,721.7p**
Per cent change from 2016	1.2%	-1.3%	**4.7%**										**1.6%**
Domestic	423.9p	410.0p	**459.4p**										**1,293.3p**
Per cent change from 2016	6.0%	3.0%	**7.7%**										**5.6%**
Transborder	84.7p	83.4p	**90.5p**										**258.7p**
Per cent change from 2016	-12.7%	-12.4%	**-5.2%**										**-10.1%**
International	60.5p	53.7p	**55.6p**										**169.8p**
Per cent change from 2016	-7.4%	-12.1%	**-1.0%**										**-7.0%**
Calgary International Total	**1,234.3r**	**1,192.3p**											**2,426.6p**
Per cent change from 2016	**2.2%**	**-0.1%**											**1.1%**
Domestic	**829.6r**	**796.5p**											**1,626.0p**
Per cent change from 2016	**2.0%**	**-1.9%**											**0.1%**
Transborder	**237.9p**	**243.5p**											**481.4p**
Per cent change from 2016	**0.6%**	**2.7%**											**1.7%**
International	**166.9r**	**152.3p**											**319.2p**
Per cent change from 2016	**5.8%**	**5.0%**											**5.4%**
Fort McMurray International Total	58.1p	**54.9p**											**113.0p**
Per cent change from 2016	-14.5%	**-22.7%**											**-18.7%**
Highway Count 2017 (000's of vehicles) [2]													
Hwy 1 -Sask border w-bound	57.7	**57.7**	**65.2**										**180.6**
Per cent change from 2016	1.1%	**0.4%**	**-8.2%**										**-2.7%**
Hwy 1 - Banff Pk Gate (2-way)	538.7	**525.2**	**591.6**										**1655.5**
Per cent change from 2016	-0.6%	**-4.6%**	**-5.5%**										**-3.7%**
Hwy 16 - Jasper Pk Gate (2-way)	89.8	**87.7**	**110.3**										**287.8**
Per cent change from 2016	-0.3%	**-1.5%**	**-7.2%**										**-3.4%**
Hwy 16 - Blackfoot w-bound	143.9	**141.8**	**160.4**										**446.1**
Per cent change from 2016	0.0%	**1.9%**	**0.1%**										**0.6%**
National Park Attendance (000's of visitors) 2017 [3] Does not include Group Tours													
Banff	**201.7**												**201.7**
Per cent change from 2016	**2.6%**												**2.6%**
Jasper	**51.2**												**51.2**
Per cent change from 2016	**0.3%**												**0.3%**
Waterton Lakes	**9.2**	**9.6**	**12.7**										**31.5**
Per cent change from 2016	**8.7%**	**-16.9%**	**-3.3%**										**-4.9%**
Elk Island	**17.9**	**18.8**	**22.6**										**59.3**
Per cent change from 2016	**29.6%**	**16.4%**	**16.5%**										**20.1%**
Wood Buffalo	**0.02**	**0.01**	**0.01**										**0.05**
Per cent change from 2016	**214.3%**	**-72.2%**	**-39.1%**										**-34.3%**
Employment (000's of persons) 2017 Seasonally Adjusted [4]													
Accommodation and Food Services	**143.8p**												**143.8p**
Per cent change from 2016	**4.4%**												**4.4%**

Sources: Edmonton International Airport, Calgary International Airport, Fort McMurray International Airport, Alberta Transportation, Parks Canada, and Statistics Canada.

Accommodation Indices for Major Regions 2017													
	Jan.	Feb.	Mar.	Apr.	May	June	July	August	Sept.	Oct.	Nov.	Dec.	Yr-to-Date
Edmonton Occupancy Rate	46.8%	56.7%											51.5%
Point change from 2016	-3.1	-1.7											-2.5
Average Daily Room Rate	$128.56	$133.48											$131.16
Variance from 2016	-1.0%	0.1%											-0.4%
Revenue per available room	$60.13	$75.67											$67.60
Calgary Occupancy Rate	42.5%	50.8%											46.4%
Point change from 2016	-3.1	0.5											-1.5
Average Daily Room Rate	$134.61	$138.79											$136.78
Variance from 2016	-4.7%	-1.5%											-3.1%
Revenue per available room	$57.15	$70.45											$63.46
Alberta Resorts Occupancy Rate	42.9%	53.2%											47.7%
Point change from 2016	0.2	-1.0											-0.5
Average Daily Room Rate	$195.37	$206.57											$201.29
Variance from 2016	6.8%	6.5%											6.5%
Revenue per available room	$83.72	$109.80											$96.09
Other Alberta** Occupancy Rate	37.4%	42.0%											39.6%
Point change from 2016	2.2	2.7											2.4
Average Daily Room Rate	$115.85	$115.98											$115.91
Variance from 2016	-5.2%	-6.0%											-5.6%
Revenue per available room	$43.33	$48.72											$45.91
Total Alberta (excl. Resorts) Occupancy Rate	41.6%	48.9%											45.1%
Point change from 2016	-0.8	1.0											0.0
Average Daily Room Rate	$125.81	$129.01											$127.47
Variance from 2016	-3.9%	-2.4%											-3.1%
Revenue per available room	$52.33	$63.03											$57.45

Accommodation Indices for Selected Cities or Towns 2017													
Occ% = Occupancy Rate **ADR**= Average Daily Room Rate **RevPar**= Revenue Per Available Room	February			Year-To-Date				February			Year-To-Date		
	Occ%	ADR	RevPar	Occ%	ADR	RevPar		Occ%	ADR	RevPar	Occ%	ADR	RevPar
Airdrie	32.9%	$95.25	$31.29	30.3%	$95.34	$28.84	Banff	69.6%	$178.97	$124.53	61.1%	$174.27	$106.44
Bonnyville	26.2%	$108.04	$28.35	27.8%	$107.88	$29.95	Canmore	46.3%	$121.75	$56.33	38.4%	$116.91	$44.88
Drayton Valley	48.9%	$111.44	$54.46	47.4%	$111.17	$52.74	Drumheller	18.8%	$115.80	$21.78	18.9%	$118.55	$22.44
Edson	72.8%	$110.77	$80.61	64.7%	$111.12	$71.92	Fort Mac	45.0%	$142.90	$64.27	44.6%	$144.37	$64.34
Fort Saskatchewan	27.7%	$110.96	$30.79	25.7%	$111.66	$28.69	Gr. Prairie	55.0%	$122.99	$67.61	53.0%	$123.25	$65.28
High Level	37.0%	$126.93	$46.94	46.0%	$124.69	$57.39	Hinton	37.1%	$95.23	$35.37	33.6%	$95.63	$32.15
Innisfail	24.6%	$81.66	$20.10	25.2%	$81.57	$20.55	Jasper	47.0%	$161.07	$75.66	43.9%	$160.83	$70.59
Leduc	44.4%	$99.43	$44.15	44.4%	$99.61	$44.27	Lethbridge	41.9%	$108.04	$45.23	38.8%	$108.15	$41.98
Lloydminster	38.6%	$112.81	$43.50	35.8%	$113.52	$40.64	Med. Hat	44.7%	$110.36	$49.30	41.5%	$109.87	$45.55
Nisku	57.3%	$97.81	$56.08	56.2%	$98.29	$54.25	Red Deer	37.2%	$104.85	$38.97	34.0%	$102.49	$34.83
Sherwood Park	33.3%	$125.87	$41.88	33.7%	$124.38	$41.94	Whitecourt	55.9%	$110.66	$61.91	55.0%	$110.53	$60.81
Total Alberta	49.9%	$137.34	$68.56	45.9%	$135.15	$62.07							

Sources: CBRE Hotels Trends in the Hotel Industry National Market Report and STR Inc.

	Jan.	Feb.	Mar.	Apr.	May	June	July	August	Sept.	Oct.	Nov.	Dec.	Yr-to-Date
Food Services and Drinking Places 2017 ($ Millions) unadjusted[7]													
Total Receipts for Alberta	**688.99p**												**$688.99**
Per cent change from 2016	**1.2%**												**1.2%**
Historic Sites and Museums 2017 (000's of visitors)[8]													
Visitor Attendance***	10.5p	**25.3p**	**27.5p**										**63.3p**
Per cent change from 2016	-0.9%	**2.9%**	**-24.2%**										**-11.4%**
Exchange Rates 2017[9]													
Canadian Dollar/U.S. Dollar (noon)	0.76	0.76	**0.75**										**0.76**
Canadian Dollar/ Euro	0.71	0.72	**0.70**										**0.71**
Canadian Dollar/ Great British Pounds	0.61	0.61	**0.61**										**0.61**
Oil Price: Western Texas Intermediate (WTI) 2017[10]													
Cushing, OK Spot Price (US Dollar per Barrel)	52.5	53.47	**49.33**										**51.77**
Major Tourism Projects Valued $5 million or Greater 2017 ($ Millions)[11]													
Total Value of Hotel Projects Inventory	$666	**$499**											**$499**
Sources: Statistics Canada, Alberta Culture and Tourism, Bank of Canada, WTI, Government of Alberta.													

*Commercial Air Service suspended from May 5-June 10 due to wildfire

**Other Alberta includes Lethbridge, Red Deer, and other Alberta communities.

***Please note some of the historical sites have changed their hours of operation - see Notes section for details.

Note: New monthly figures are shown in bold type. Revisions will be bolded.
r=revised p=preliminary

1. Air Passengers - Numbers are preliminary estimates of air passenger arrivals and departures at the Edmonton International and Calgary International Airports. From September 2015, total domestic passengers at Fort McMurray International Airport has been added.
Source: Edmonton International Airport, Calgary International Airport and Fort McMurray International Airport websites.

2. Highway Traffic: These are monthly totals. The monthly average daily traffic (average number of vehicles per day) is calculated by dividing the monthly total by the number of days in the month passing the counter locations and in the direction indicated for a particular month. Automatic Traffic Recorders counts all vehicles by direction. Year to date is a cumulative total for all vehicles.
Source: Alberta Transportation's Automatic Traffic Recorders (ATR). http://www.transportation.alberta.ca/3459.htm

3. National Park Attendance - Attendance is reported as the number of visits to National Parks in Alberta. Data are preliminary unless otherwise noted.
Banff National Park and Jasper National Park reflect independent travellers only, and do not include people travelling as part of a tour group. Tour group data is included in the annual edition of Market Monitor.
Source: Parks Canada.

4. Employment Food and Accommodation Sector - The employment figure represents all persons who worked for pay, profit or unpaid work in the food services and accommodation sector, including businesses or other ventures owned or operated by a related family member(s) during the reference period of the survey. The year-to-date total is an average for the year.
Source: Statistics Canada, Labour Force Survey.

5. Accommodation Indices for Major Regions - Occupancy rates and average daily room rates are based on monthly averages of all reporting hotels, motels and motor hotels in each designated region. Alberta Resorts includes the resort communities of Banff, Lake Louise, Kananaskis, Canmore and Jasper.

Revenue per available room is calculated using the occupancy rate and average daily room rate.

Source: CBRE Hotels Trends in the Hotel Industry National Market Report, with reproduction and use of information subject to CBRE Disclaimer and Restrictions as detailed at www.cbre.ca

6. Accommodation indices for Selected Cities or Towns - Destination reports are publications of Smith Travel Research Inc. (STR). Terms and conditions governing the ownership, distribution and use of these Destination Reports and their contents include that no historic data can be published, only current month and year-to-date data.
Source: STR Inc.

7. Food Services and Drinking Places - The monthly survey of Food Services and Drinking Places provides estimates of the value of sales and the number of locations of restaurants, caterers, and drinking places by province and by industry at the North American Industry Classification System (NAICS) four-digit level. Includes total receipts from restaurants, caterers and taverns for chain and independent establishments. The target population is the 3 digit NAICS level of 722, which includes: Full-service restaurants, limited service eating places, special food places and drinking places. The year-to-date total is an average for the year.
Source: Statistics Canada, Food Services and Drinking Places.

8. Historic Sites and Museums - Visitor attendance figures are monthly totals based on 15 historic sites, the Royal Tyrrell Museum of Paleontology and the Tyrrell Field Station. **The Royal Alberta Museum closed on December 6, 2015.
Source: Alberta Culture and Tourism

9. Exchange Rate - this is the average monthly exchange rate.
Source: Bank of Canada.

10. Western Texas Intermediate - This is the average monthly oil price.
Source: Cushing, OK WTI Spot Price FOB.

11. Major hotel projects in Alberta - This is the inventory of hotel projects in Alberta, including new hotels and renovations valued at $5 million or greater. It is not a complete list of hotel projects. The project stages included in the reported number are: announced, under construction and completed. If the project is completed, it will be removed from the inventory after 30 days from completion. More information on other tourism and recreation projects is available on the website provided below.
Source: Government of Alberta. http://majorprojects.alberta.ca/

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